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ABSTRACT

The adult education literature contains a considerable amount of research on and discussion of client service in the marketing process, management and staff roles in service- and product-oriented businesses, and the importance of client service and service quality to survival in the marketplace. By applying the principles of client-oriented service, Virginia Tech (Virginia Polytechnic Institute and State University) has undertaken a comprehensive project to improve its continuing education program. This program improvement process has included looking at environmental trends, reviewing competitors, establishing the program's current functioning with direction for the future, and planning a strategy to reach program goals. The methodologies used have included written questionnaires, focus group interviews, personal and telephone interviews, and a literature review. As a result of the information gathered, the program's capabilities and staff training efforts have been expanded and several new client services have been added. Training materials were obtained and training workshops on various client services were held for the staff involved in serving continuing education students, including administrators, faculty, and all hotel and operating services staff. (MN)

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THE COMPETITIVE ADVANTAGE: CLIENT SERVICE

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TO THE EDUCATIONAL RESOURCES INFORMATION CENTER (ERIC)."

The terms client service and service quality are becoming phrases which we frequently see in the literature and the newspapers. These phrases are used to denote goals toward which we should all strive regardless of our business orientation--service or product. In fact, we are told regardless of our organization, the achievement of client service and service quality are critical to survival in the marketplace. Although these goals are ones that in reality few people could dispute, what do they mean and how do you know you are achieving them?

The purpose of this paper is to answer those questions and to relate the answers to the field of continuing education. Specifically, this client service movement will be discussed in a framework of relevant literature along with how Virginia Tech's Continuing Education Program has used this information to strengthen its program and processes.

The Concept--Client Service and Quality

Although separate definitions may be used, in reality client service and quality are the same. Quality is defined as meeting client expectations. These expectations in terms of minimum performance occur throughout a transaction process. Kotler (1972) introduced the transaction concept to service organizations, and it is widely accepted today. We exchange value for value received. Value received at minimum denotes that expectations were met. Albrecht and Zembe (1985) expanded on this concept noting that several significant events or contacts

occur with clients in a transaction. These contacts were termed "moments of truth" which occur in a cycle of service or transaction. These "moments of truth" identify many major opportunities where a client's expectations may or may not be met.

The client evaluates value received or expectations in terms of the totality of an experience within an organization. If all contacts with the organization proceed as expected, the client believes quality has been received. The client believes extra value has been received when service exceeds these minimum expectations. Thus the term "value added" meaning expectations are exceeded.

Two major points emerge from this discussion. First, quality cannot be defined without asking the client. Knowing clients in terms of their needs, attitudes, perceptions, values, and motivations is critical. Our orientation may not necessarily be the orientation of the client. Expectations cannot be met even at a minimum unless knowledge exists about what the expectations are. Second, clients come to organizations with their own expectations and use these expectations to make judgments. To the degree that an organization participates with clients in setting realistic expectations and providing feedback on meeting these expectations, the greater probability of success will be experienced by the organization.

This concept has numerous direct implications in continuing education. We do sell a service/product--learning. The way we

promote and advertise a specific program or series of programs defines expectations. Each person who participates in a program is engaged as well in a larger transaction leading to program participation and is engaged in many "moments of truth." This larger transaction might include such activities as receiving the promotional brochure by mail and the way it was received, calling for more information, the registration process, receipt of registration and confirmation, receiving location directions, or receiving instructional materials, finding the way to the meeting room or receiving a name tag, receiving a list of all those participating, receiving notification of changes or program cancellation, receiving instruction, and the list could go on and on. The point being that while we are concentrating on the learning aspect of the experience a lot of other activities are taking place which may or may not be meeting the expectations of our clientele. It is entirely possible for someone to learn and at the same time say quality was missing. Again, quality is defined based on expectations relating to the totality of the experience. The entire continuing education unit is involved then in meeting expectations and providing additional value throughout the entire process which results in learning. As an organization, it is important to understand this process and to insure that clients expectations at minimum are met (quality is provided). There is relevant literature which defines those things as a service organization with which we should be concerned--a framework for action for service quality.

A Framework For Action

A considerable amount of research and literature exists in the area of client service. The literature describes client service in the marketing process, management's role, and the staff role. Some of the highlights of this research and literature are summarized briefly below.

1. Quality is distinguished in clients' minds and can be used for competitive advantage in the marketplace (Lovelock, 1987). Our clients are no different in what they seek and know than we are. We appreciate quality and will tend to be loyal to those who provide it. If quality is missing, a justifiable action is to look somewhere else to have our needs met. Client service can be a competitive advantage when a service package is built and delivered based on clients' expectations and needs.

2. The Forum Corporation (1988) recently completed a comprehensive research project on the topic. This project confirmed that clients who do not have their expectations met, will be susceptible to changing vendors (from our perspective educational institutions). In viewing quality and measuring expectations from the client perspective, five dimensions were identified. These dimensions were reliability (providing what was promised, dependably and accurately); assurance (knowledge and courtesy of

employees); empathy (caring and individual attention); responsiveness (helping clients and providing prompt service); and tangibles (physical facilities and equipment along with appearance of personnel). It is interesting that clients value reliability the most followed by responsiveness and then assurance. When looking at these same dimensions, employees perceive responsiveness to be the most important followed by assurance. To employees, reliability is third in importance. What this says is the first and most important way to improve the perception of service quality is to concentrate on reliability. This may require some retraining with staff to insure that the totality of client expectations are understood. Staff must concentrate on insuring that those "moments of truth" which are critical to the client are identified and managed properly.

3. Lewis and Morris (1987) found that it does make a difference in how complaints are resolved. When complaints are resolved promptly, credibility is enhanced. The more crucial challenge, however, are our numerous clients who have negative reactions and do not share them. These individuals along with those who do not feel their complaints were resolved will tend to spread negative reactions by word of mouth.

This can only be dealt with by determining what is on clients' minds. The longer an organization is in business the easier it is to get out of touch with clients' concerns and feelings. Business goes on as usual and significant trends with clients go unnoticed. This constant research with clients at first may appear to be a very time consuming process which can be done as time permits. However, it is this constant attention to detail and study which makes it possible to use service quality as a differentiation in the marketplace.

4. Management plays a crucial role in client service. Quality is not something that is going to happen by accident--it must be planned for and demonstrated through behavior. The expectations of clients must be managed through the cycle(s) of service, and this requires that the entire organization focus on the client. Service packages must be built upon those attributes which are most important to the client.

   The Forum Corporation (1988) defined management factors and internal environmental factors which are crucial in focusing the organization. The management factors included performance goals and standards which were client focused, taking personal action to solve client problems, seeking innovative ways to serve clients better, and helping employees learn how to serve

clients better. The internal environment factors included aligning the larger organization to serve clients; building capability to serve clients; seeing excellence of service as an important value, and living up to it; and connecting with clients.

It must be management's role then to place client service as a key component of an overall service strategy. By knowing and listening to clients' needs, it is possible to build service packages based on client expectations by market segments. In this context, client service becomes a philosophical as well as operational orientation.

5. The delivery of quality is tied closely as well to staff and those who on a day-to-day basis interact with clients. Irons (1983) describes two major roles for staff. Staff must listen to clients and demonstrate the responsiveness of the organization to their needs in delivering what was promised. There is nothing more frustrating to a client than to be told coldly it cannot be done due to policy or that the system will not allow it. Staff members must understand their roles and the overall contribution they make in terms of client impact. They must be rewarded for achieving client service performance goals, and likewise reprimanded when they do not.

Staff members are as well as an endless source of information about clients needs and expectations. Unless staff are involved in a team orientation for client service which transcends departmental boundaries, many opportunities will be lost to demonstrate value added to the client because a proactive source of feedback was not used.

Staff members look to management to play a guidance role with clients and to be attuned to staff needs as well. Staff can demonstrate more caring with clients when such caring is demonstrated to them. Care for and about staff--these are the individuals who provide the vital link to clients and must successfully deal with each "moment of truth."

The key points in the above framework for action are probably best summarized by Albrecht and Zembe (1985). In their work on the topic, they conceptualized The Service Triangle to illustrate the relationships. At the top of the triangle, is the service strategy which is developed from client expectations and how service is going to be delivered to them. The center of the triangle is the customer and directs all the other components of the triangle. It is a constant reminder that market research with clients provides the vision for the organization. The left of the triangle is the systems. These are designed for the convenience of the client and with the perspective of the client in completing a transaction. The right side of the triangle is

the people. These are the managers and staff who distinguish service in the clients' minds and meet those expectations. This triangle summarizes well that the delivery of service quality requires long and short-term planning as well as attention to details. Attention to each area of the triangle is required for the client to recognize a difference.

Much of the literature and research above was discovered as part of a long-range planning process by Virginia Tech's Continuing Education Program. The management group perceived a strength in the area of client service and perceived this was an area where improvement could have a decided impact in the marketplace. Described below is the process used to strengthen our client service program and thereby improve quality. Before describing the process and outcomes to date, a brief overview of the program is provided.

Virginia Tech's Continuing Education Program

Virginia Tech has a centralized continuing education program in support of non-credit programs originating through the eight colleges of the University. Each college has a full or part-time representative for continuing education. Virginia Tech is a land-grant institution and has an extensive array of non-credit programs. Some 350-375 programs are offered annually involving some 20,000 participants. The Program is fortunate to include a residential center, The Donaldson Brown Center for Continuing Education, on the Virginia Tech campus in Blacksburg, Virginia.

Many clients who are external to the University use the Center for educational meetings as they would a hotel.

The staff of the overall program could be categorized in three major areas. First, the Program Development Unit includes several support departments. These departments include Conferences and Institutes, Conference Services, Marketing, Production, and Registration. This unit supports ninety percent of all programs planned and held. Second, Hotel and Operating Services manages the facility itself where over fifty percent of the programs are held--Lodging, Food Service, Housekeeping, Meeting Rooms, Audio-visual Support, and Special Events to enrich the University community culturally. The third area consists of newly developed outreach components. These include Technology Transfer, Continuing Education in Northern Virginia, and Continuing Education in Virginia Beach. All areas report to the Director of Continuing Education who in turn reports to the Vice Provost for Extension. All programs are required to be self-supporting paying direct program costs as well as personnel and other administrative costs.

The Continuing Education Program then as an organization has many different categories of clients with different expectations and different cycles of service. These clients include College Representatives for Continuing Education, faculty, University department heads who are involved in programs and use the Center to house and entertain University visitors, program participants, external agencies who use the facility, participants in special

events, luncheon guests, dinner guests, and representatives of numerous clientele groups served through program development. And last but not least, each department and service unit is a client to each other in support of meeting overall goals. It was in this context that a process was established to improve client service/quality.

The Process

This process is part of long-range strategic planning in support of expanding and strengthening Virginia Tech's Continuing Education Program. The overall goal is to develop a vision for the Program based on the strengths of the University and marketplace demand. Marketplace demand is defined in terms of program development with specific clientele groups and in terms of maximal usage of the Donaldson Brown Center. Research and development has been occurring for the last two years with more concentration of time and effort in the last year. More concentrated effort has been possible in the last year with professional staffing increasing from fifty percent to a 100 percent level. The process has included looking at environmental trends, reviewing competitors, establishing our current functioning with direction for the future and planning a strategy to reach our goals. Methodologies have included written questionnaires, focus group interviews, personal interviews, telephone interviews, and a review of the literature. All has been driven by the goal to be identified as a continuing

education program known for its responsiveness to clientele in terms of service packages based on their needs.

Commitment was made by the management team to the process and the process was shared with all staff. A client service task force was elected by staff with a representative serving from each department.

The process was entered into from a known posture of strength and reputation. It is not possible here to summarize all the results from this process. To demonstrate the potential of the process, however, the highlights of our findings are shared.

What We Learned

Provided below are the highlights of major findings.

University Department Heads. A focus group interview was held with a random sampling. The group included users and non-users of our services. The users perceived us to be reliable and felt good about interactions with all levels of personnel. The users challenged the overall program to expand staff with a greater assistance in market research in response to changes in the marketplace and the number of competitors. Some confusion existed about procedures relating to when the Center could be reserved for University functions and programs.

Faculty. A random sampling of faculty received a written questionnaire distributed by a marketing research class and follow-up telephone calls were made to another sample. The basic

finding was that faculty knew very little about us unless they had participated with us on a program. Most University correspondence had not been read or was filed be to read when needed. Faculty users had a good image of our services but were not aware of total scope of services unless they had used them all. Faculty users desired as well more assistance with market research in support of program development. The major complaint by department heads and faculty was that there was not enough University recognition in terms of tenure and promotion for participation in non-credit continuing education activities.

Faculty specifically asked for more checklists to help them think through the planning process and to maintain primary contact with one person on their program from beginning to end.

Staff. A written questionnaire was developed using much of the information from the Forum research. Generally, staff felt good about what they did and perceived themselves as providing quality service. Some expressed concern about salary levels, and these staff were mainly in housekeeping.

Generally staff wanted ownership and decision making opportunities in support of client service. They were motivated by being rewarded for client service and desired a more extensive employee recognition program. More socialization outside of normal work hours was sought by some.

Weaknesses were sighted in two major areas. The first was the alignment with the larger organization. Second and consistent with the first was that some departments were more

rigid than others in responding to client needs.

College Representatives. The college representatives echoed the need for more market research and promotion assistance. They were supportive and requested staff expansion and expansion of services. They were willing to pay for quality. The reliability of our organization was deemed good but expectations were increasing in terms of services and feedback. Delivering what was promised was the most important to them along with attention to detail.

Some of the other requests included a liquor license for the Center to include more than beer and wine, better directions to the Center off the major highways, a better sign in front of the Center, dimmers in the conference rooms, a "greeter" for each group coming to the Center, better nametags, and desktop publishing.

Participants. A random sampling of participants across all types of programs was made. Interviews by telephone were conducted. Participants rated the registration process, brochure content and information, and program content and instruction as high. The two major reasons sighted for enrolling were the name of Virginia Tech and the content. The location of the seminar near them was important. In the facilities off-campus they sought comfort and such amenities as no smoking facilities. For seminars on-campus being at the University was generally important. More information on the University was sought by on- and off-campus participants.

External Clients. These clients were generally not familiar with the scope of the services available at the Center, through the Program Development Unit, or on the University campus before coming to a planning meeting. Seeking the Center out as a meeting location was primarily a function of word of mouth, contact with a faculty member, or coming to the Center for another meeting. These clients generally favored administrative costs being recovered through the lodging rates as opposed to a separate per person fee. The University environment was an important factor. More information was sought on activities available throughout the University. Travel directions at times could be a problem. These clients felt their expectations were met in terms of service and facility.

Lodging/Food Service. Our lodging rooms are described as adequate and comfortable. Value is received. TV reception is the most frequently cited problem. Lodgers as well want more information on the University. Food service is rated generally as good. The most frequent requests are for "lighter" lunches in response to health concerns and the ability to purchase hard alcohol.

Environmental Scanning. Two significant trends were noted. Business/industry, professional associations, and state agencies were looking to Universities to develop long-term program relationships. The investment of training dollars is more and more linked to inhouse, tailored instruction. Motels are starting to mirror conference centers in terms of services

provided--the meeting market is a stronger target market. This strategy is in response to an overbuilding of lodging accommodations for the traveler.

Although all facets of the process are not complete, many actions based on the findings have been taken. A staff retreat is planned in late November to finalize many areas of planning.

Outcomes to Date

Some of the major outcomes of this client service process to date are listed below. These include the addition of services, expansion of capability, and staff training.

1. A University Task Force on Needs Assessment was appointed by the Vice Provost. This Task Force was expanded to include community college representatives who were facing similar challenges. The result is a comprehensive needs assessment process to be used with individual organizations. To date, 12 assessments have been completed reaching over 15,000 employees in organizations. Ten programs are in progress resulting from these assessments.
2. A one-half day training program was held for faculty interested in doing programs. The program dealt with such topics as market research, program design, promotion, and University recognition.
3. Videotapes on customer service were received from different organizations for review by the staff.

4. A new mission statement has been developed, and the client service task force is developing a set of organizational values for customer focus.
5. All program and hotel and operating services staff completed the Myers-Briggs Type Indicator. Two training sessions were held to give staff the results and show how they could be used to improve working relationships and relationships with clients.
6. A Team Building Workshop was held for all department heads. Several follow-up strategies were identified.
7. A Service Circle among departments will be formed for long-range program planning and implementation in support of client service. This will be in addition to weekly staff meetings.
8. A new promotional brochure on the Center is being developed with additional information about the University.
9. A new set of materials is being developed for use by faculty in planning programs and conducting market research.
10. A quarterly newsletter is distributed to the entire University community highlighting program accomplishments, explaining services, citing faculty accomplishments, and listing upcoming events.
11. University Information Services is developing a walking tour of the campus for participants. The tour will

include highlights from each college, the library, and bookstore.

12. Each participant in a program on or off-campus now receives a one page summary on the University in addition to other information on recreation, jogging trails, etc.
13. The Center has obtained a complete alcohol license.
14. A canopy will be installed on the front of the Center in a couple of weeks with the name prominent.
15. A new travel brochure is in process.
16. Much of the necessary feedback to faculty and clients has been hampered by staffing and lack of automation. The Center by the end of the year will have a computer network, including desktop publishing.
17. The pricing structure for administrative cost recovery has been revamped to allow for service and staff expansion. This structure includes as well differentiation between on and off-campus programs and facility usage by external groups. External groups now have the option of including program administrative costs in lodging rates.
18. A systematic process has been identified for the professional staff to contact each University department head personally. These contacts will be completed by June, 1989.

19. A series of meetings is being scheduled among staff from departments to clarify roles and to determine how the system can be more flexible in terms of client responsiveness.

20. The University Provost has established a Task Force to make recommendations on faculty reward in tenure and promotion for participation in non-credit activities. The report of the Task Force is due at the end of November.

This process then has brought changes and is allowing us to operate as an organization more attuned to client needs and meeting client expectations. The process has provided a renewed staff synergy.

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